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10/648,747	08/25/2003	Juei-Mei Wang		3751

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EXAMINER	
HAYLES, ASHFORD S	
ART UNIT	PAPER NUMBER
3687	

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Please find below and/or attached an Office communication concerning this application or proceeding.

The time period for reply, if any, is set in the attached communication.

Office Action Summary	Application No.	Applicant(s)	
	10/648,747	WANG, JUEI-MEI	
	Examiner	Art Unit	
	Ashford S. Hayles	3687	

-- The MAILING DATE of this communication appears on the cover sheet with the correspondence address --

Period for Reply

A SHORTENED STATUTORY PERIOD FOR REPLY IS SET TO EXPIRE *3* MONTH(S) OR THIRTY (30) DAYS, WHICHEVER IS LONGER, FROM THE MAILING DATE OF THIS COMMUNICATION.

- Extensions of time may be available under the provisions of 37 CFR 1.136(a). In no event, however, may a reply be timely filed after SIX (6) MONTHS from the mailing date of this communication.
- If NO period for reply is specified above, the maximum statutory period will apply and will expire SIX (6) MONTHS from the mailing date of this communication.
- Failure to reply within the set or extended period for reply will, by statute, cause the application to become ABANDONED (35 U.S.C. § 133). Any reply received by the Office later than three months after the mailing date of this communication, even if timely filed, may reduce any earned patent term adjustment. See 37 CFR 1.704(b).

Status

1)☒ Responsive to communication(s) filed on *27 February 2008*.

2a)☒ This action is **FINAL**. 2b)☐ This action is non-final.

3)☐ Since this application is in condition for allowance except for formal matters, prosecution as to the merits is closed in accordance with the practice under *Ex parte Quayle*, 1935 C.D. 11, 453 O.G. 213.

Disposition of Claims

4)☒ Claim(s) *1-10* is/are pending in the application.

4a) Of the above claim(s) _____ is/are withdrawn from consideration.

5)☐ Claim(s) _____ is/are allowed.

6)☒ Claim(s) *1-10* is/are rejected.

7)☐ Claim(s) _____ is/are objected to.

8)☐ Claim(s) _____ are subject to restriction and/or election requirement.

Application Papers

9)☐ The specification is objected to by the Examiner.

10)☒ The drawing(s) filed on *27 August 2003* is/are: a)☒ accepted or b)☐ objected to by the Examiner.

Applicant may not request that any objection to the drawing(s) be held in abeyance. See 37 CFR 1.85(a).

Replacement drawing sheet(s) including the correction is required if the drawing(s) is objected to. See 37 CFR 1.121(d).

11)☐ The oath or declaration is objected to by the Examiner. Note the attached Office Action or form PTO-152.

Priority under 35 U.S.C. § 119

12)☐ Acknowledgment is made of a claim for foreign priority under 35 U.S.C. § 119(a)-(d) or (f).

a)☐ All b)☐ Some * c)☐ None of:

1.☐ Certified copies of the priority documents have been received.

2.☐ Certified copies of the priority documents have been received in Application No. _____.

3.☐ Copies of the certified copies of the priority documents have been received in this National Stage application from the International Bureau (PCT Rule 17.2(a)).

* See the attached detailed Office action for a list of the certified copies not received.

Attachment(s)

1) ☒ Notice of References Cited (PTO-892)
2) ☐ Notice of Draftsperson's Patent Drawing Review (PTO-948)
3) ☐ Information Disclosure Statement(s) (PTO/SB/08) Paper No(s)/Mail Date _____.
4) ☐ Interview Summary (PTO-413) Paper No(s)/Mail Date. _____.
5) ☐ Notice of Informal Patent Application
6) ☐ Other: _____.

DETAILED ACTION

1. Amendment received on February 27, 2008 has been acknowledged. Claims 1, 6, and 10 are amended and have been entered. Therefore, claims 1-10 are pending.

Response to Amendment

2. Applicant's amendments are sufficient to overcome previous 35 USC 102 (b) rejections.

Claim Rejections - 35 USC § 101

3. 35 U.S.C. 101 reads as follows:

> Whoever invents or discovers any new and useful process, machine, manufacture, or composition of matter, or any new and useful improvement thereof, may obtain a patent therefor, subject to the conditions and requirements of this title.

4. Claims 6-9 are rejected under 35 U.S.C. 101 because the claimed invention is directed to non-statutory subject matter.

Claim 6 recites a method for managing at least one account payable, which include the steps of obtaining a cargo receipt, calculating procurement, determining advance payment, deducting a sum, determining and deducting a discount, determining a return in addition to returning a refund and updating an accounts payable. Examiner contends that a process must (1) be tied to another statutory class (such as a particular apparatus) or (2) transform underlying subject matter (such as an article or materials) to a different state or thing. Neither of these requirements are met by the claim, therefore the claim does not qualify as a statutory process and recites purely mental steps.

Claim Rejections - 35 USC § 103

5. The following is a quotation of 35 U.S.C. 103(a) which forms the basis for all obviousness rejections set forth in this Office action:

> (a) A patent may not be obtained though the invention is not identically disclosed or described as set forth in section 102 of this title, if the differences between the subject matter sought to be patented and the prior art are such that the subject matter as a whole would have been obvious at the time the invention was made to a person having ordinary skill in the art to which said subject matter pertains. Patentability shall not be negatived by the manner in which the invention was made.

6. Claims 1-10 are rejected under 35 U.S.C. 102(b) as being unpatentable over Wong et al. (# 6,115,690) in view of Mason (PG PUB. 2001/0051919) further in view of Weiszfeiler (PG PUB. 2004/0249703).

As per Claim 1, Wong et al. discloses a system for managing accounts payable, the system comprising:

a database server for storing accounts payable data (Such as the single database disclosed in Column 12, line 22 and shown in Figure 2B) is provided storing a database including files belonging to different business domains, e.g. a products domain, a payments domain, a financial performance domain and a personnel domain);

an application server electrically connected with the database server for accessing and processing data stored in the database server (Database Management System (DBMS) is construed to be the application server. See Figure 2B and 3),

the application server comprising a data obtaining module for obtaining data from external systems (Modules are discussed in Column 12, lines 55-64 and shown in Figure 2B, as for example sales, sales support and in Figure 3 as payments and products. Data is received from external systems as shown in the arrows of Figure 2B, also see Figure 3 showing internal access),

a procurement confirming module for confirming fulfillment of procurements according to cargo receipt data (Column 13, lines 51-57 discuss a quote number and the quote date are displayed at the top of the quote. The salesman assigned to the account is displayed, together with account-specific defaults concerning shipping and payment terms. Then the items quoted are displayed, including description, manufacturer part number, unit price, quantity, and extended price. The sub-total, applicable tax, and total are calculated and displayed. Quote is described as a form of confirming items for procurement),

a purchase return managing module for managing purchase returns (Column 29, lines 28-29, discuss returns are provided for through a Return Merchandise Authorization (RMA) mechanism),

a payment data managing module for managing payment data (See Figure 86A and 86B),

an account payable managing module for managing and updating the account payable data stored in the database server (Column 37, lines 12-17 discuss invoices and other records are viewed and modified, they are flagged to be checked by a centralized GL module to determine if the modification requires an adjusting entry. If so, the adjusting entry is made automatically alongside the original entry, invoices and accounts payable data are known within the art of accounts management to be included within other records to be entered into a general ledger),

and an account booking module for automatically generating accounting entries (Column 36, lines 62-64, discuss having instead of manual posting of accounting

entries, posting is automatic, either continuous or at user-specified intervals such as done nightly);

and a plurality of client computers electrically connected to the application server for downloading data from and uploading data to the database server (See Figure 3).

However, Wong et al. fails to disclose a procurement data managing module for managing procurement data obtained from the external systems and a payment date and sum calculating module for calculating optimal payment sums and dates according to payment term data obtained by the data obtaining module.

Mason teaches a third-party EBPP server hosts the Oracle database that warehouses all customer invoice data in a format accessible by the web-server interface. The stored bills include all necessary information to generate a complete invoice for the customer including bill summary, bill detail, and all data elements originally defined in the statement definition (pg 2. ¶ [0024]). Mason further teaches a web application executing on the BG EBPP server pre-populates the calculated early payment discount (EPD) amount, the total amount due and, the re-calculated date depending upon the point in time when the customer has accessed the on-line invoice (pg. 2 ¶ [0035]), thus calculating a payment date, sum and optimal payment.

Therefore, it would have been obvious to one of ordinary skill in the art to modify the business to business web commerce system of Wong et al. to include the procurement managing system and payment sum, date and optimum payment calculator as taught by Mason in order to reduce days receivable outstanding (pg.1, ¶ [0012]).

As per Claim 2, Wong et al. discloses, a system wherein the application server further comprises a data searching module for users to search the accounts payable data and accounting entries data (Column 34, lines 23-28 discuss using a related switch feature, where a user may select one or more records within the output display and select a related file from a pop-up of related files. The system then searches in the related file for records related to the selected records and displays the related records in the output display format of the related file. Column 34, lines 30-31 further disclose the related switch capability may be used to switch to related customer invoices, vendor invoices, credit memos, etc).

As per Claim 3, Wong et al. discloses, a system wherein the application server electrically connects with a procurement management system for accessing procurement data stored in the procurement management system and updating the accounts payable data in the database server accordingly (Column 37, lines 12-17 discuss invoices and other records are viewed and modified, they are flagged to be checked by a centralized GL module to determine if the modification requires an adjusting entry. If so, the adjusting entry is made automatically alongside the original entry. It is known within the art of accounts management that accounts payable data is included within other records to be entered into a general ledger, therefore any updates for accounts payable will occur within the general ledger of this system).

As per Claim 4, Wong et al. discloses a system wherein the application server electrically connects with an inventory management system for accessing cargo receipt

data stored in the inventory management system, (See Figure 28A-28B, which show shipping information for products shipped from an inventory).

As per Claim 5, Wong et al. discloses a system wherein the application server electrically connects with a bank note management system for accessing payment data stored in the bank note management system (Column 37, lines 21- 25 discuss an AR portion of the GL functionality would make general ledger entries immediately to reflect payment information as it is input, a purchasing portion would make general ledger entries immediately to reflect obligations as incurred through purchase orders. By definition bank note is any form of payment, therefore payment information inputted within the system are identical to the process of accessing payment data).

As per Claim 6, Wong discloses a method for managing accounts payable, the method comprising the steps of:

(a) obtaining cargo receipt data of a procurement (See Figure 29A-29B, which show shipping data and item shipped);

(b) calculating at least an account payable for the procurement according to procurement data stored in a database server (Column 35, 9-11 discuss shipping records are then searched, and freight charges for shipments with the specified carrier during the specified period are totaled);

(g) determining whether a purchase return related to the procurement has occurred (Column 29, lines 28-30 discuss returns are provided for through a Return Merchandise Authorization (RMA) mechanism);

(h) deducting a sum of a refund of the purchase return from the account payable if a purchase return related to the procurement has occurred (Column 29, lines 60-63 discuss if a return is for credit, for example, then return type 1 is the corresponding return type. Depending on whether payment was by check, credit card or credit memo, different fields may be applicable); and

(i) updating the account payable of the procurement (Column 37, lines 12-17 discuss invoices and other records are viewed and modified, they are flagged to be checked by a centralized GL module to determine if the modification requires an adjusting entry. If so, the adjusting entry is made automatically alongside the original entry).

However, Wong et al. fails to disclose (c) determining whether the procurement has an advance payment, (d) deducting a sum of the advance payment from the account payable if the procurement has an advance payment.

Mason teaches (c) determining whether the procurement has an advance payment (pg. 3, ¶ [0032] a calculation is performed based on the eligibility criteria. If the criteria is met, that invoice appears online with a `discounted` or `adjusted` total amount due for each tier), (d) deducting a sum of the advance payment from the account payable if the procurement has an advance payment (Figure 4(c), Total Amount Due 462 and 464, depicts a deduction amount and the deducted payment amount).

Therefore it would have been obvious to one of ordinary skill in the art at the time invention was made to modify the integrated business-to-business web commerce and automation system of Wong et al. to include a method of determining whether an

advance payment is made and a deducting a sum of the advance payment from the total amount due as taught by Mason in order to reduce days receivable outstanding (pg.1, ¶ [0012]).

The combination of Wong et al. and Mason teaches all the elements of the claimed invention, but fails to explicitly disclose (e) determining whether the procurement has a purchase discount, and (f) deducting a sum of the purchase discount from the account payable if the procurement has a purchase discount.

Weiszfeiler teaches a method and system for providing an incentive to customers by (e) determining whether the procurement has a purchase discount (pg. 2, ¶ [0021], the discount to which the member is entitled on the present purchase is determined) and (f) deducting a sum of the purchase discount from the account payable if the procurement has a purchase discount (pg. 2 ¶ [0021] the discount to which the member is entitled is then subtracted from the value of the present purchase to produce the net value of he present purchase).

Therefore, it would have been obvious to one of ordinary skill in the art to modify the Wong et al.-Mason combination to include the method and system for providing an incentive to customers as taught by Weiszfeiler in order to induce potential customers to frequently patronize a business (pg. 1, ¶ [0004).

As per Claim 7, Wong et al discloses a method wherein the step (a) further comprises the step of generating a certificate of the account payable (Column 36, lines 10-11 discuss accounting information is presented in the form of financial statements.

The usage of the term certificate indicates a document showing credits and debits, therefore "financial statements" are interchangeable).

As per Claim 8, Wong et al. discloses a method wherein the procurement data are obtained from a procurement management system (Column 19, lines 16-19 discuss an intelligent catalog management, in an exemplary embodiment, is based on a concept of "baseline." A baseline is a collection of products that functions as a standard of comparison).

As per Claim 9, Wong et al. discloses a method, further comprising the steps of: (j) retrieving payment terms data of the procurement according to the procurement data (Column 24, lines 28-29 discuss assembled information is input to A/P and A/R modules. Customer payments are received and entered in conjunction with the A/P module);

(k) calculating an optimal payment sum and date according to the payment terms data (See Figure 93A-93C, that displays a date, payment sum as Total Invoice, payment terms as Amount for each Invoice and where optimal payment is construed as a payment schedule with billed amount and due date);

(l) sending the optimal payment sum and date to a financial department (Column 24, lines 31-36 discuss a general ledger (GL) module tracks transactions and their financial implications in real time. It therefore receives information from the A/P, A/R and virtual inventory modules as well and entry points E6 and E7. Bank statement information is also input to the general ledger module at entry point E8);

(m) receiving a payment message about the procurement (See Figure 104A and 104333B); and

(n) balancing the account payable of the procurement, and generating relevant accounting entries (See Figure 106A and 106B).

As per Claim 10, Wong et al discloses a system for managing accounts payable comprising:

a database server for storing accounts payable data (Column 12, lines 55-59 discuss a Web-enabled, client/server relational database management system is provided storing a database including files belonging to different business domains, e.g. a products domain, a payments domain, a financial performance domain and a personnel domain);

means for retrieving cargo receipt data of a procurement (Column 33, lines 16-17 discuss when an order is shipped, a customer invoice is automatically issued, i.e., entered into the computer system);

means for calculating at least an account payable for the procurement according to the data of the procurement (Column 13, lines 51-57 discuss items quoted are displayed, including description, manufacturer part number, unit price, quantity, and extended price. The sub-total, applicable tax, and total are calculated and displayed. Where items are procurements and total amount are construed as forms of accounts payable);

means for determining whether a related purchase return has occurs and deducting a sum of said purchase return from the account payable if applicable (Column

29, lines 28-29, discuss returns are provided for through a Return Merchandise Authorization (RMA) mechanism and Column 29, lines 60-63 further discuss if a return is for credit, which is inherently determined as a reduction from a customers purchase); and

means for updating the account payable of the procurement (Column 37, lines 12-17 discuss invoices and other records are viewed and modified, they are flagged to be checked by a centralized GL module to determine if the modification requires an adjusting entry. If so, the adjusting entry is made automatically alongside the original entry, where the usage of the term modified and modification is synonymous with updating),

However, Wong et al. fails to disclose a means for determining whether a related advance payment has been made and deducting a sum of said advance payment from the account payable if applicable and means for determining whether a related purchase discount exists and deducting a sum of said purchase discount from the account payable if applicable.

Mason teaches a means for determining whether a related advance payment has been made and deducting a sum of said advance payment from the account payable if applicable (Figure 4(c), Early Payment Discount 462 and Total Payment Amount 464).

Therefore it would have been obvious to one of ordinary skill in the art at the time invention was made to modify the integrated business-to-business web commerce and automation system of Wong et al. to include a method of determining whether an advance payment is made and a deducting a sum of the advance payment from the

total amount due as taught by Mason in order to reduce days receivable outstanding (pg.1, ¶ [0012]).

The combination of Wong et al. and Mason teaches all the elements of the claimed invention, but fails to explicitly disclose means for determining whether a related purchase discount exists and deducting a sum of said purchase discount from the account payable if applicable.

Weiszfeiler teaches a method and system for providing an incentive to customers by (e) determining whether the procurement has a purchase discount (pg. 2, ¶ [0021], the discount to which the member is entitled on the present purchase is determined) and (f) deducting a sum of the purchase discount from the account payable if the procurement has a purchase discount (pg. 2, ¶ [0021] the discount to which the member is entitled is then subtracted from the value of the present purchase to produce the net value of he present purchase).

Therefore, it would have been obvious to one of ordinary skill in the art to modify the Wong et al.-Mason combination to include the method and system for providing an incentive to customers as taught by Weiszfeiler in order to induce potential customers to frequently patronize a business (pg. 1, ¶ [0004).

Response to Arguments

7. Applicant's arguments with respect to claim 1-10 have been considered but are moot in view of the new ground(s) of rejection.

Conclusion

8. Applicant's amendment necessitated the new ground(s) of rejection presented in this Office action. Accordingly, **THIS ACTION IS MADE FINAL**. See MPEP § 706.07(a). Applicant is reminded of the extension of time policy as set forth in 37 CFR 1.136(a).

A shortened statutory period for reply to this final action is set to expire THREE MONTHS from the mailing date of this action. In the event a first reply is filed within TWO MONTHS of the mailing date of this final action and the advisory action is not mailed until after the end of the THREE-MONTH shortened statutory period, then the shortened statutory period will expire on the date the advisory action is mailed, and any extension fee pursuant to 37 CFR 1.136(a) will be calculated from the mailing date of the advisory action. In no event, however, will the statutory period for reply expire later than SIX MONTHS from the date of this final action.

Any inquiry concerning this communication or earlier communications from the examiner should be directed to Ashford S. Hayles whose telephone number is 571-270-5106. The examiner can normally be reached on Monday thru Thursday 8:30 to 4:00 Eastern Time.

If attempts to reach the examiner by telephone are unsuccessful, the examiner's supervisor, Matthew Gart can be reached on (571) 272-3955. The fax phone number for the organization where this application or proceeding is assigned is 571-273-8300.

Information regarding the status of an application may be obtained from the Patent Application Information Retrieval (PAIR) system. Status information for published applications may be obtained from either Private PAIR or Public PAIR. Status information for unpublished applications is available through Private PAIR only. For more information about the PAIR system, see http://pair-direct.uspto.gov. Should you have questions on access to the Private PAIR system, contact the Electronic Business Center (EBC) at 866-217-9197 (toll-free). If you would like assistance from a USPTO Customer Service Representative or access to the automated information system, call 800-786-9199 (IN USA OR CANADA) or 571-272-1000.

/Elaine Gort/
Primary Examiner, Art Unit 3687

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